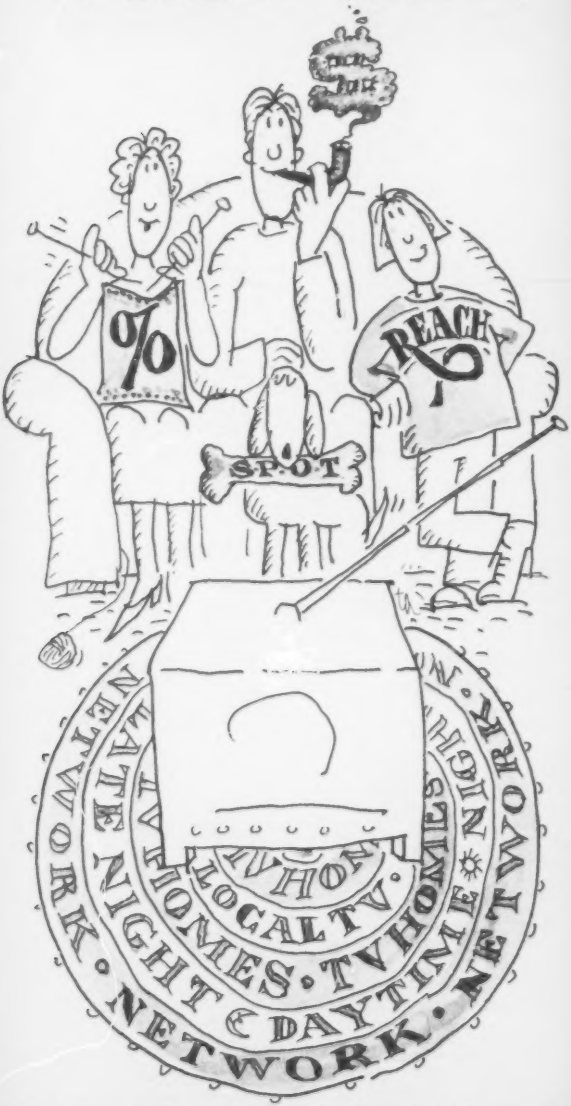
TVB

TV Basics – 1988-89



The Television Bureau of Advertising's report on the scope and dimensions of television today.

Television Reaches 98% of all Households

TV Household Coverage 98%

	Number of Households (millions)	Percent of TV Households
With Television	88.6	100%
With Color Television	85.0	96%
With More Than One Television Set	53.5	60%
With VCR	51.4	58%

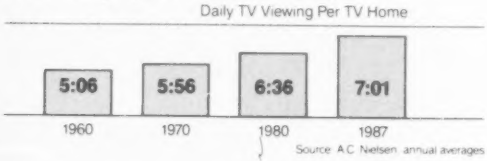
Source: A.C. Nielsen TV Homes, Jan. 1988

Commercial Television Stations

	1980	1985	1988
Total	734	883	1030
VHF	516	520	539
UHF	218	363	491

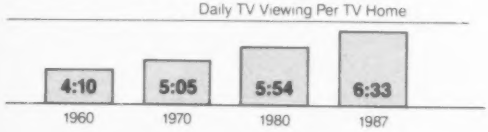
Source: Television Digest, Jan. of each year

TV viewing tops seven hours per day

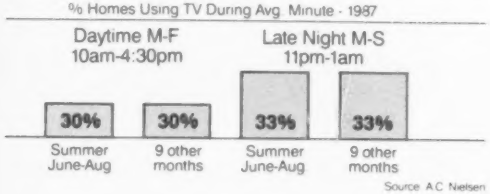


Source: A.C. Nielsen, annual averages

Summer viewing tops 6½ hours per day...



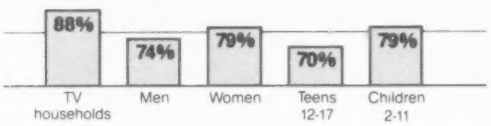
...and summer viewing equals other months in some major dayparts



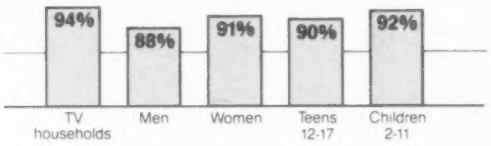
Source: A.C. Nielsen

Television Reaches Most People Everyday

In an average day:



In an average week:



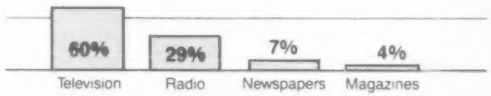
Daily Hours of Viewing:

7:38	4:25	5:17	3:41	3:50
TV households	Men	Women	Teens 12-17	Children 2-11

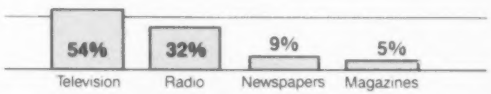
Source: A.C. Nielsen Reach, Feb. 82 Viewing, Feb. 88

Adults spend more time with television than the other major media combined

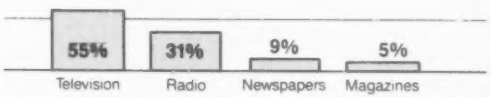
All Adults



In $50,000+ Income Homes



College Educated



Source: T. 3/R.H. Bruskin, Jan. 1985

Cable and VCR Homes Spend More Time With Over-the-Air Television

Average hours per day

Viewing	Non-Cable	Basic Cable	Pay Cable
Over-the-Air	7:16	6:09	6:37
Cable Originated	—	1:30	1:40
Pay Cable	—	—	1:27

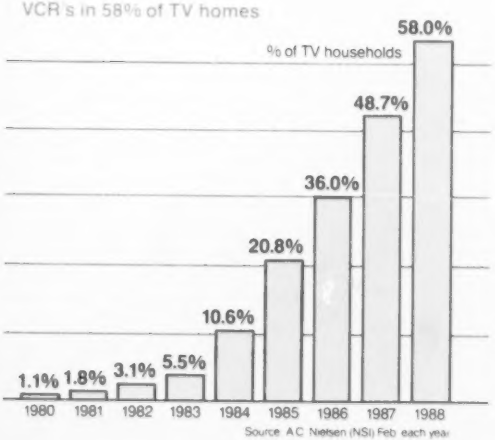
Source: A.C. Nielsen, Feb. 1988

VCR households view more television

Non-VCR	VCR		
	Total	Reg. Usage	Rec./Set Off
6:56	7:07	6:56	:11

Source: A.C. Nielsen, NTI VCR Status Report, 1987 annual average

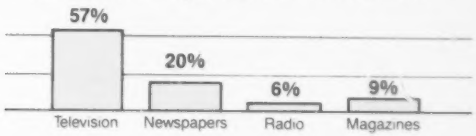
VCR's in 58% of TV homes



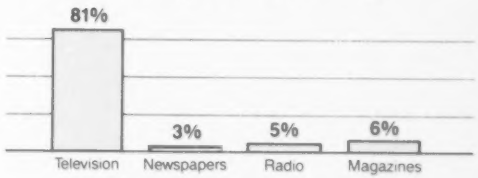
Source: A.C. Nielsen (NSI) Feb. each year
TVB estimates prior to 1984

Television is By Far The Most Authoritative, Exciting, Influential, Believable Medium; The Source of Most News

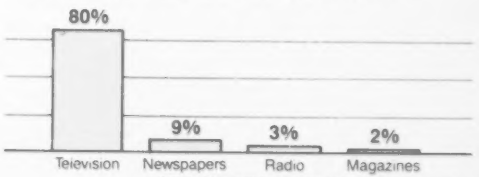
Which advertising is the most authoritative?



Which advertising is the most exciting?

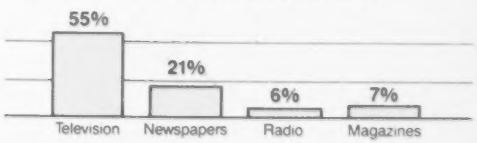


Which advertising is the most influential?

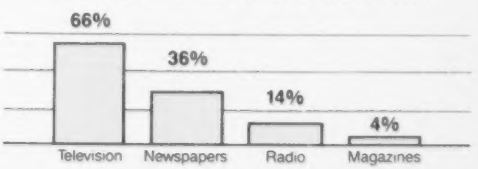


Source: TVB/Bruskin, Jan. 1985, percent of adults responding

Which medium is the most believable?

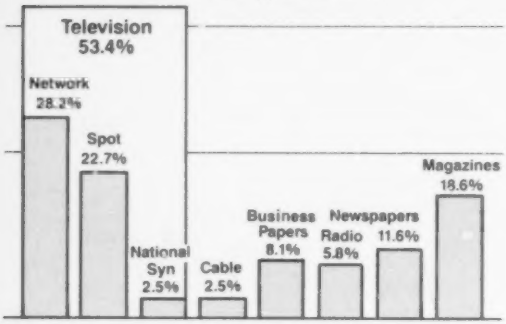


Which medium is the source of most news?



Source TIO/Roper, 1986, percent of adults responding

Television is the Number One National Advertising Medium



National Ad Volume:

	Millions of Dollars 1986	1987	% Change	% of Total
TELEVISION	$15,512	$16,108	+ 3.8	53.4
Network	8,342	8,500	+ 1.9	28.2
Spot	6,570	6,846	+ 4.2	22.7
Nat'l Syndication	600	762	+27.0	2.5
Newspapers	3,376	3,494	+ 3.5	11.6
Magazines	5,317	5,607	+ 5.5	18.6
Radio (Network & Spot)	1,771	1,743	- 1.6	5.8
Cable	676	760	+12.5	2.5
Business Papers	2,382	2,458	+ 3.2	8.1
Total Major Media	$29,034	$30,170	+ 3.9	100.0

Local Ad Volume:

	Millions of Dollars 1986	1987	% Change	% of Total
TELEVISION	$6,514	$6,833	+ 4.9	17.9
Newspapers	23,614	25,918	+ 9.8	67.8
Retail	14,311	15,227	+ 6.4	39.8
Classified	9,303	10,691	+14.9	28.0
Radio	5,178	5,463	+ 5.5	14.3
Total Major Media	$35,306	38,214	+ 8.2	100.0

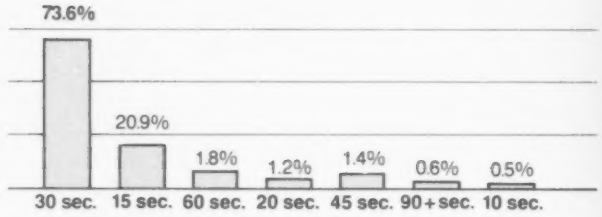
Total Ad Volume:

	Millions of Dollars 1986	1987	% Change	% of Total
TELEVISION	$22,026	$22,941	+ 4.2	20.9
Newspapers	26,990	29,412	+ 9.0	26.8
Magazines	5,317	5,607	+ 5.5	5.1
Radio	6,949	7,206	+ 3.7	6.6
Cable	855	963	+12.6	0.9
Business Papers	2,382	2,458	+ 3.2	2.2
All Others	37,621	41,063	+ 9.1	37.5
Total Advertising	$102,140	$109,650	+ 7.4	100.0

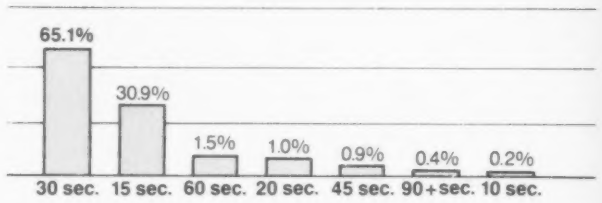
Source McCann-Erickson 5/88

The 30-second Commercial Still Dominates

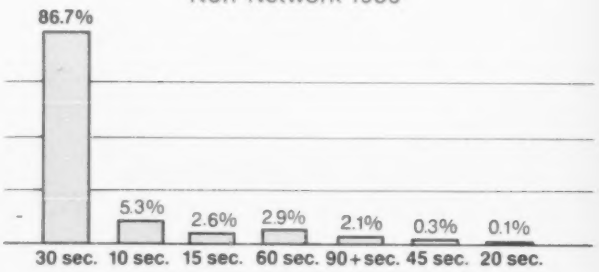
Network 1986



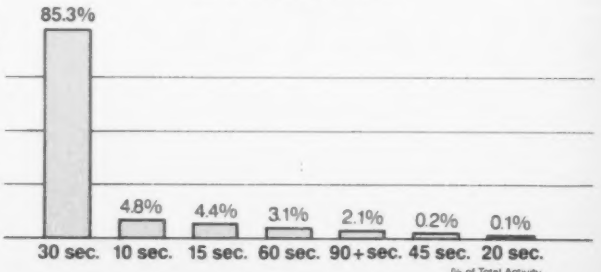
Network 1987



Non-Network 1986



Non-Network 1987



% of Total Activity
Source BAR

Top 20 Spot Television Categories, 1987

	Millions of Dollars 1987
1. Automotive	$1,152
2. Food & Food Products	987
3. Confectionery & Soft Drinks	373
4. Consumer Services	264
5. Toiletries & Toilet Goods	255
6. Beer & Wine	237
7. Sporting Goods & Toys	221
8. Travel, Hotels & Resorts Outside U.S.	205
9. Proprietary Medicines	194
10. Publishing & Media	169
11. Household Equipment & Supplies	145
12. Soaps, Cleaners & Polishers	136
13. Gasoline, Lubricants & Other Fuels	124
14. Insurance	118
15. Home Electronics Equipment	87
16. Building Materials, Equipment & Fixtures	76
17. Apparel, Footwear & Accessories	61
18. Household Furnishings	51
19. Pet Food & Supplies	51
20. Horticulture	50

Source BAR

Top 40 Local Television Categories, 1987

	Rank	TV $ In Millions	% Chg Over 1986
Amusements & Entertainment	13	$120.6	- 6
Appliance Stores & Repair	9	143.8	+ 2
Auto & Truck Dealer Sales	2	371.4	+10
Auto Repair & Service Stations	17	87.3	+ 9
Auto Supply & Accessory Stores	26	44.6	+13
Banks, Savings & Loan Associations	5	202.2	- 4
Beauty Shops & Supplies	36	19.4	+24
Builders & Real Estate	28	39.7	+ 4
Carpet & Floor Covering Stores	23	51.5	+18
Clothing Stores	14	116.5	+ 4
Dairy Stores	39	13.4	+ 7
Department Stores	7	168.5	- 5
Discount Department Stores	12	122.7	+ 9
Drug Stores	18	79.4	+ 1
Education Services	15	98.8	+15
Financial Planning Services	31	35.7	+ 5
Food Stores & Supermarkets	3	346.3	+14
Furniture Stores	4	218.7	+12
Gas, Electric & Water Companies	25	46.3	+11
Hardware Stores	32	25.8	+51
Health Clubs & Reducing Salons	22	52.0	+24
Home Improvement Contractors & Bldg. Supp.	16	95.5	+ 3
Hotels & Resorts, U.S.	20	71.3	- 2
Insurance Agencies	38	14.3	+63
Jewelry & Metal Exchange Stores	34	23.0	- 15
Legal Services	21	59.0	+26
Leisure Time Activities & Services, Misc.	11	124.2	+ 5
Loan & Mortgage Companies	33	23.0	- 4
Mail Order & Catalog Showrooms	37	15.9	+ 1
Medical & Dental Services	10	130.5	+15
Movies	6	177.0	+31
Music Stores	40	12.7	+17
Newspapers	30	37.6	+13
Optical Services & Supplies	19	73.9	+56
Radio & TV Stations & Cable TV	8	152.5	+ 4
Rental Services	29	38.9	-10
Restaurants & Drive-Ins	1	800.4	+ 7
Shoe Stores	24	47.3	+11
Shopping Centers & Associations	35	22.4	+ 9
Sport, Hobby & Toy Stores	27	42.6	+ 6

Source BAR

Top 40 Local Television Categories, 1987

Percent of Commercials by Month

	Day M-F	Early Eve	Night	Late Night	Wkend Day	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Amusements & Entertainment	35	22	10	19	14	10	10	10	9	7	8	9	8	8	8	7	6
Appliance Stores & Repair	32	23	11	24	10	9	8	8	7	7	8	7	8	8	8	10	12
Auto & Truck Dealer Sales	23	24	12	27	14	8	9	10	8	9	9	9	9	9	8	7	5
Auto Repair & Service Stations	14	26	15	28	17	5	7	9	9	9	9	11	10	9	10	8	4
Auto Supply & Accessory Stores	14	28	17	27	14	5	4	8	12	16	10	7	6	8	9	8	7
Banks, Savings & Loan Associations	17	31	22	22	8	7	9	10	9	10	9	6	6	8	11	9	6
Beauty Shops & Supplies	36	17	11	23	13	9	10	8	8	9	7	7	12	8	7	9	6
Builders & Real Estate	35	22	10	18	15	7	11	11	11	10	8	7	9	8	9	6	3
Carpet & Floor Covering Stores	44	18	8	20	10	7	8	9	8	9	8	7	9	8	10	9	8
Clothing Stores	30	28	12	21	9	6	5	8	10	7	7	5	10	7	8	12	15
Dairy Stores	34	25	10	15	16	4	7	5	11	14	18	6	4	11	5	7	8
Department Stores	38	30	12	16	4	5	5	8	7	7	7	4	10	8	9	14	16
Discount Department Stores	38	32	12	15	3	2	4	7	6	9	7	4	8	10	12	15	16
Drug Stores	39	29	11	16	5	7	5	7	9	8	7	6	7	7	9	11	17
Education Services	83	6	2	5	4	9	8	8	7	7	9	8	10	10	9	8	7
Financial Planning Services	34	24	11	19	12	18	18	14	10	5	5	4	5	6	7	5	3
Food Stores & Supermarkets	37	27	16	15	5	7	8	7	8	10	9	9	8	9	9	8	8
Furniture Stores	39	19	9	22	11	9	9	8	7	8	8	8	9	9	8	9	8
Gas, Electric & Water Companies	21	31	19	18	11	6	6	8	10	10	10	6	6	10	12	10	6
Hardware Stores	23	35	12	21	9	4	6	8	10	11	8	7	8	9	10	10	9
Health Clubs & Reducing Salons	63	17	6	10	4	13	9	9	8	7	8	7	8	10	9	7	5
Home Improvement Contractors & Bldg. Supp.	31	25	11	21	12	5	7	9	10	11	9	7	8	11	11	7	5
Hotels & Resorts, U.S.	29	25	14	22	10	8	10	13	11	13	13	8	6	5	4	5	4
Insurance Agencies	45	14	7	21	13	8	8	7	7	7	8	8	7	9	10	11	10
Jewelry & Metal Exchange Stores	38	20	10	23	9	5	7	4	6	6	4	4	6	5	7	14	32
Legal Services	77	7	3	9	4	8	8	8	8	8	8	8	9	9	9	9	8
Leisure Time Activities & Services, Misc.	32	27	11	19	11	7	8	9	6	10	13	15	13	6	6	4	3
Loan & Mortgage Companies	44	16	8	21	11	9	7	7	8	7	9	8	10	9	10	8	8
Mail Order & Catalog Showrooms	29	35	13	16	7	5	5	3	3	6	4	2	2	8	9	15	38
Medical & Dental Services	54	18	7	14	7	10	10	9	8	9	8	7	8	9	9	8	5
Movies	17	45	11	22	5	7	7	8	7	6	9	11	14	8	7	10	6
Music Stores	31	19	8	28	14	5	8	7	7	4	6	5	7	9	7	12	23
Newspapers	24	27	19	22	8	9	9	9	12	10	5	4	5	11	12	9	5
Optical Services & Supplies	38	25	10	18	9	7	8	10	8	9	10	8	10	9	9	7	5
Radio & TV Stations & Cable TV	26	28	16	21	9	8	7	7	13	14	9	3	4	8	11	10	6
Rental Services	57	18	5	9	11	7	9	8	9	7	7	6	8	9	10	10	10
Restaurants & Drive-Ins	18	36	18	19	9	7	7	8	9	8	9	10	10	9	8	8	7
Shoe Stores	42	29	8	15	6	4	5	11	13	8	5	2	13	12	7	11	9
Shopping Centers & Associations	50	21	7	15	7	6	5	5	8	4	4	5	9	6	6	12	30
Sport, Hobby & Toy Stores	30	25	11	20	14	3	4	5	5	5	5	3	5	5	7	23	30

Color numerals indicate highest TV month.
Source: BAR

Television Bureau of Advertising, Inc.
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